

# LAW OFFICES OF BRUCE KETRON

ESTATE PLANNING, TRUST AND PROBATE

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## ESTATE VALUATION

\$ \_\_\_\_\_ Family Home

\$ \_\_\_\_\_ Other Real Property

\$ \_\_\_\_\_ Notes and Deeds of Trust

\$ \_\_\_\_\_ Savings Accounts

\$ \_\_\_\_\_ Money Market Accounts

\$ \_\_\_\_\_ Certificates of Deposit (CDs)

\$ \_\_\_\_\_ Stocks and Bonds

\$ \_\_\_\_\_ Municipal Bonds

\$ \_\_\_\_\_ T-Bills / Government Bonds

\$ \_\_\_\_\_ Mutual Funds

\$ \_\_\_\_\_ Limited Partnerships

\$ \_\_\_\_\_ Business Interests

\$ \_\_\_\_\_ Annuities

\$ \_\_\_\_\_ IRA, KEOGH or Pension Plan

\$ \_\_\_\_\_ Life Insurance

\$ \_\_\_\_\_ Other Investments

\$ \_\_\_\_\_ Autos, Household and Personal Safe Deposit Box

  

\$ \_\_\_\_\_ TOTAL ASSETS

\$ \_\_\_\_\_ Less: LIABILITIES

\$ \_\_\_\_\_ = NET WORTH